University of Essex

People Manager

User Guide

BUSINESS SYSTEMS TEAM

For Reporting Managers

Click HERE to log in

Contact us:
ihrsys@essex.ac.uk
http://www.essex.ac.uk/staff/hr_organiser/

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Introduction

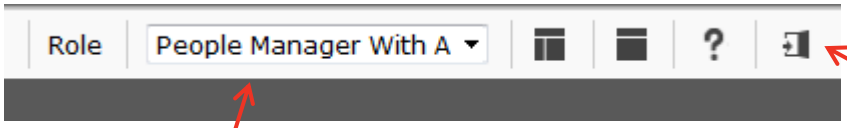
What is People Manager? People Manager is a tool, allowing reporting managers and administrators with selected access, to manage staff leave and view sickness records online. It has a host of other reporting benefits and in the future, further modules such as booking training courses and claiming expenses will be introduced to make your working life easier and more efficient.

People Manager sits within the core HR & Payroll system called iTrent. It holds the University's organisational structure, payroll and personal details of every staff member.

Data Protection
People Manager will only give you access to information related to staff who report to you. It is essential that you follow the University's Data Protection Policy and Staff Privacy Policy – please take the time to read these for a reminder of your responsibilities.

Important Security Information
The University's People Manager tool contains highly sensitive personal information about your staff and it is important that you use it responsibly and securely.

When you have finished using People Manager please always ensure that you log out. To do this click on the 'Logout' link in the top right hand corner of the People Manager page.



Logout

If you have more than one role in iTrent then your current role will be displayed. Using the dropdown you can switch between roles meaning you don't have to log out and back in again.

It is also important that you **never let anyone else know your University of Essex username and password** as this information would allow people to access information on you and your staff through People Manager and HR Organiser, exposing a risk of identity fraud.

If at any point you feel that your information security may have been compromised you should contact the University's IT Helpdesk desk@essex.ac.uk or call x2345.

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Navigating People Manager

People Manager is accessible at the following link: https://ihr.essex.ac.uk/tlive_web/

You will need your University username (**without** the @essex.ac.uk) and your University password. This is the same password you use to log on to the network and your emails.

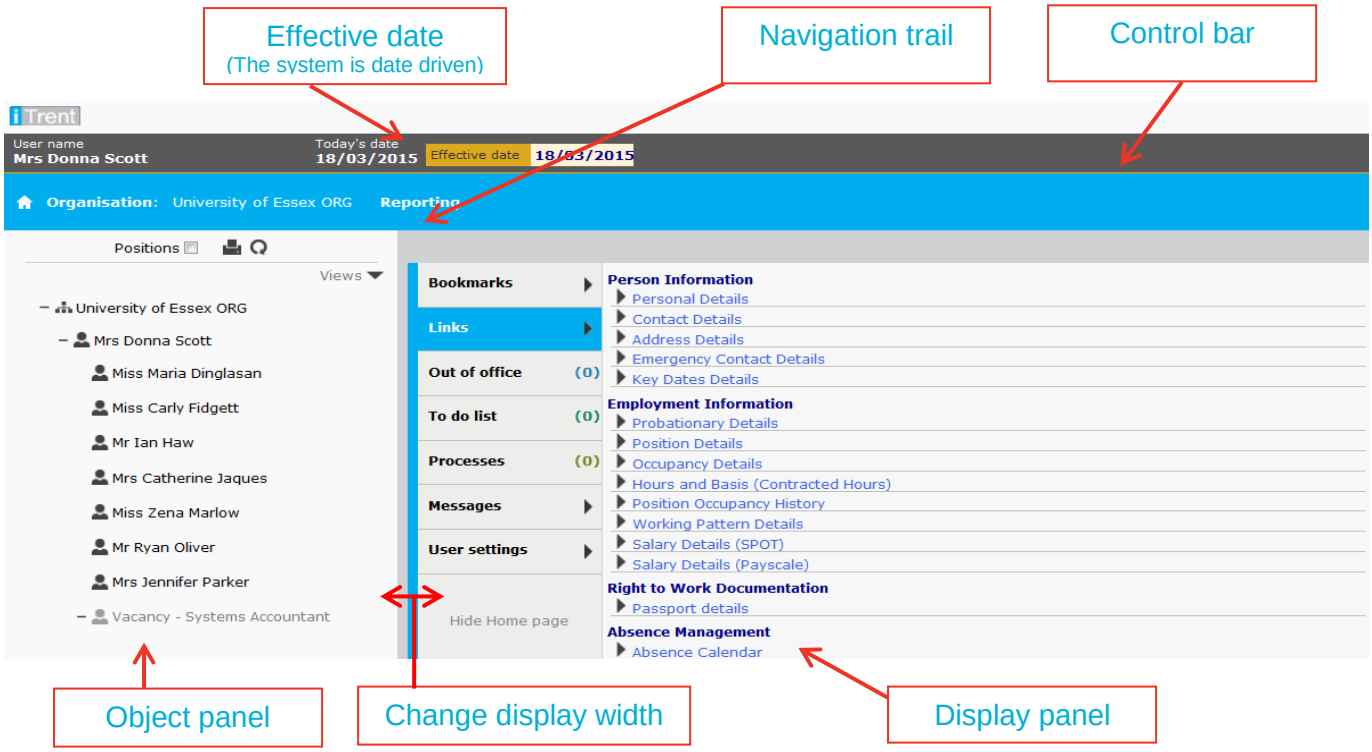
Having trouble logging in? Your password must not contain any of the following characters " £ ¬ ¦ | \ if it does you will need to reset it which can be done here: https://www.essex.ac.uk/password/login.aspx
If you are still having problems please contact the IT helpdesk.

Access to iTrent is based on **roles.** The role you are allocated determines which parts of iTrent you can access, what you can see and whether you can update fields or simply view them.

*Note: **do not** use the internet browser refresh or back/forward buttons when navigating through People Manager as this will expire your session.*

The Homepage

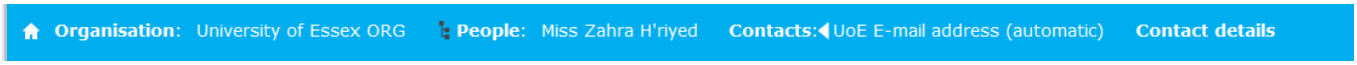
When using People Manager all the information is accessed through the homepage. This is the first screen you see once you log in to iTrent. It displays features you can use to navigate around the system.



You can resize the Object and Display panels by hovering between the columns and dragging them to your desired setting, making either one of them larger or smaller.

The Navigation Trail

As you make various selections the navigation trail will update to indicate the selections you have made. The trail is made up of individual items; each item is split into a header (**bold text**) and its contents (normal text). You can click on a navigation item to return to that point in the trail.



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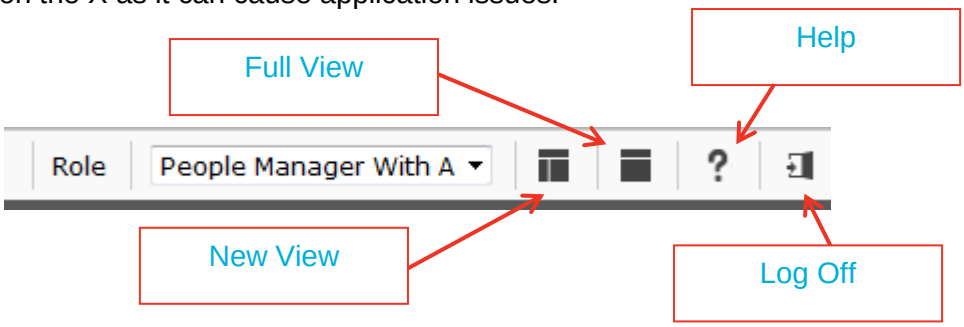
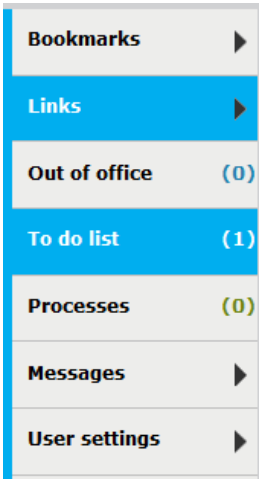
The Control Bar

The control bar holds useful buttons to quickly move around the system. Your name and today's date appear towards the left hand side of the toolbar. The effective date is next to today's date and towards the right hand side you find a series of buttons. The first button is the **New View** button and clicking on this opens up a fresh screen without disrupting your existing screen. The **Full View** button maximises what you can see in the display panel. The **Help** button allows you to look for more information on specific fields, essentially an iTrent dictionary. Finally the **Log Off** button allows you to exit iTrent. Please use this button rather than clicking on the X as it can cause application issues.



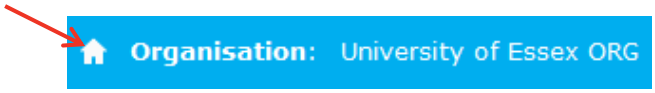
The Display Panel

The display panel performs two functions. When you first log in the display panel is your homepage with various options to the following sections:

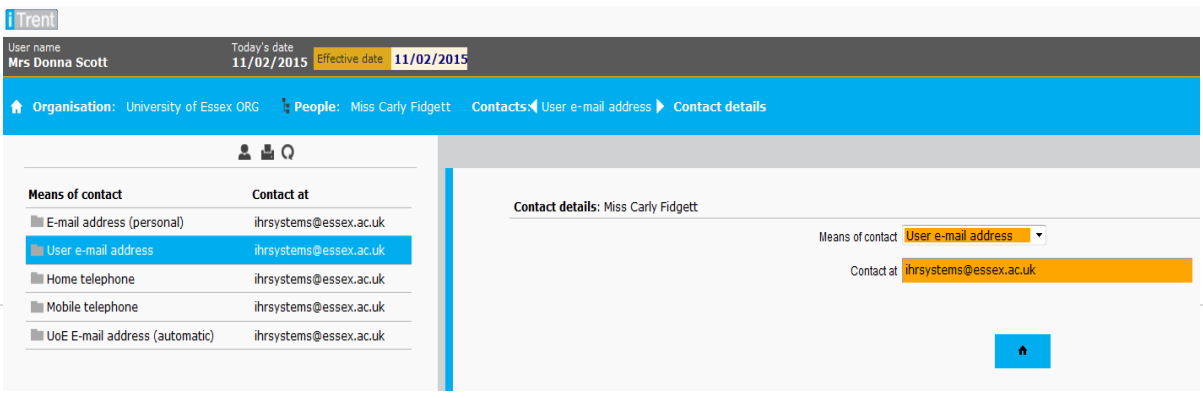


Bookmarks – you will not need to use this area as all screens you require are accessible from the **Links** menu
Links - this is the main navigation menu for users where you will access all available screens
Out of Office – this area will show when one or more of your reportees is shown as absent in iTrent (due to sickness, holiday or a learning event)
To Do List – this area will show tasks which require action in your role as a People Manager, this is where you will authorise annual leave and other tasks
Processes – this will show any Management Information reports or system processes which may have been run in the last 24 hours
Messages - this will display any standard messages sent to all iTrent users
User Settings – this area allows you to amend some basic user settings relating to your People Manager access, you are advised **not to change any of the settings** in this area

To get back to the homepage to view your links and your to do list click on the home icon at the front of the navigation trail. You can do this from any page you are in.



The second function of the display panel is to display the results of your selections. To view any information you must first select the reportee you want to view the information of. Select them from the left hand menu. Once a reportee has been selected you can then click on a link from the homepage. The information will be displayed in the main section of the screen (the display panel).



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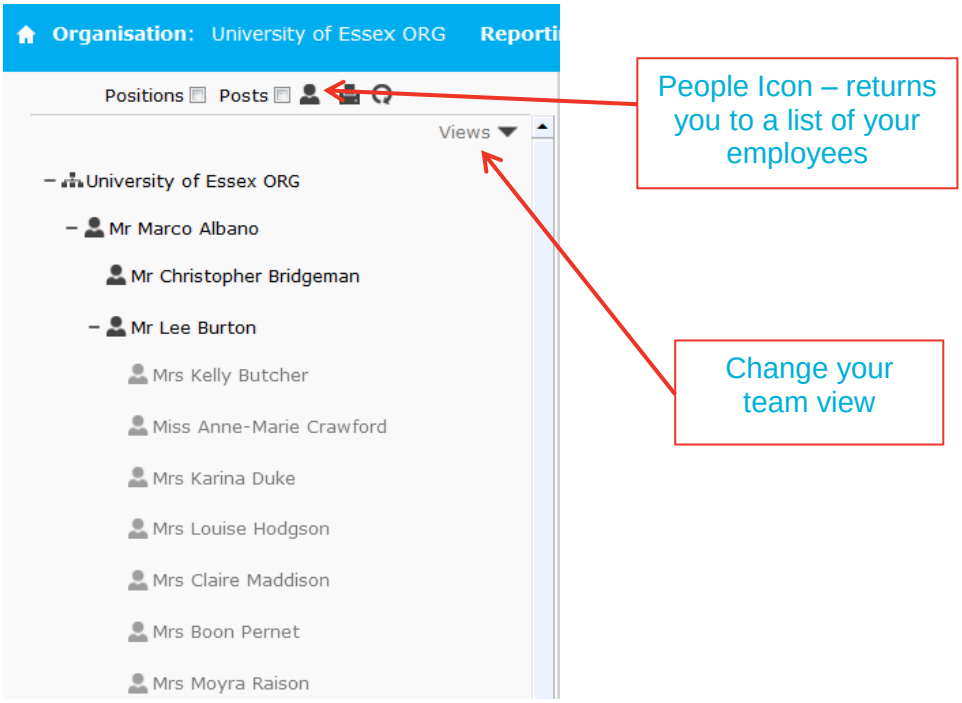
Team Structure

Your staff will be listed as a default view on the left hand side of the home screen when you log in. If you click on Organisation in the navigation trail the organisational structure will only be in view. Click on the People icon to return to view your staff. All your direct reportees are in **bold** with their reportees in a lighter grey if applicable.



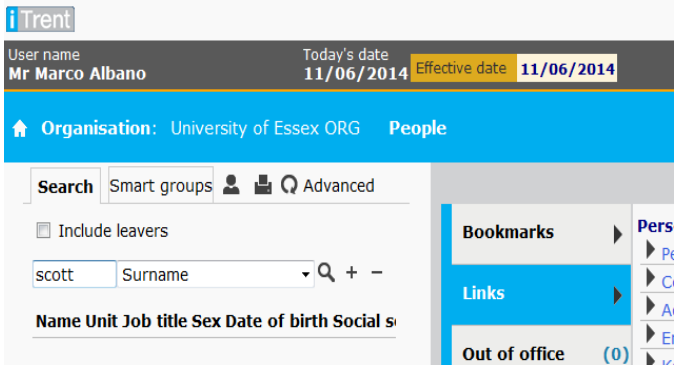
Organisation Structure

The organisational structure on People Manager is set up to list your direct reportees. They will be listed in dark grey and lighter grey if you are not the direct line manager. Each user can control how they wish to view and select their reportees. When you first log in the system defaults to Reporting view but if you select the View drop down you are able to select People Search, Hierarchical or Semi-hierarchical views instead.

Click on the positions tick box if you want to view your reportee's positions under their names. Vacant positions that report to you are also shown.

To view more information about an employee select their name and then one of the links on the homepage.

Tip: If you have a lot of employees reporting to you, you may wish to use the **People Search** view instead. You can search by a specific employee using a range of search criteria in the dropdown menu. If you want to go back to the reporting view just click on the **People icon**. By clicking on **Advanced** you can make a more detailed search. If the person has left within the last 30 days select the **Include Leavers** tick box.



Please note: you should not select the smart groups tab as this functionality is not applicable to People Manager

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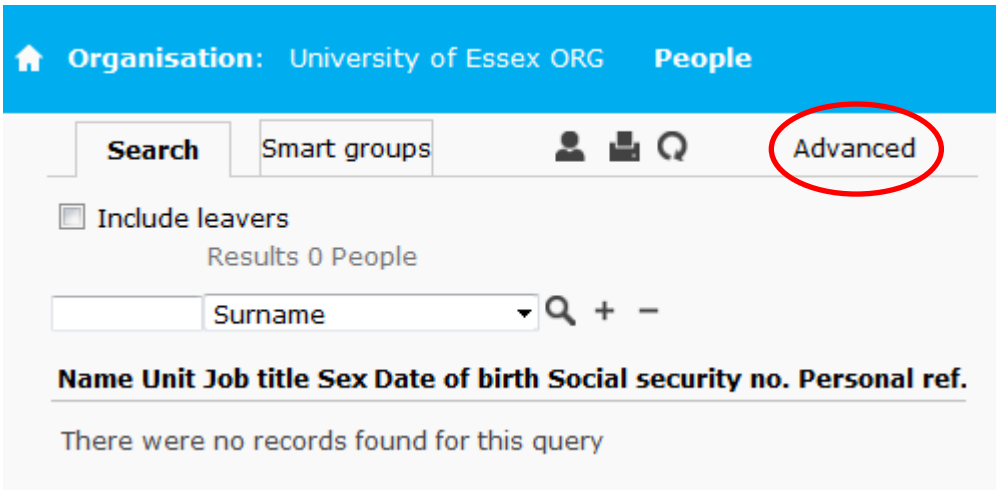
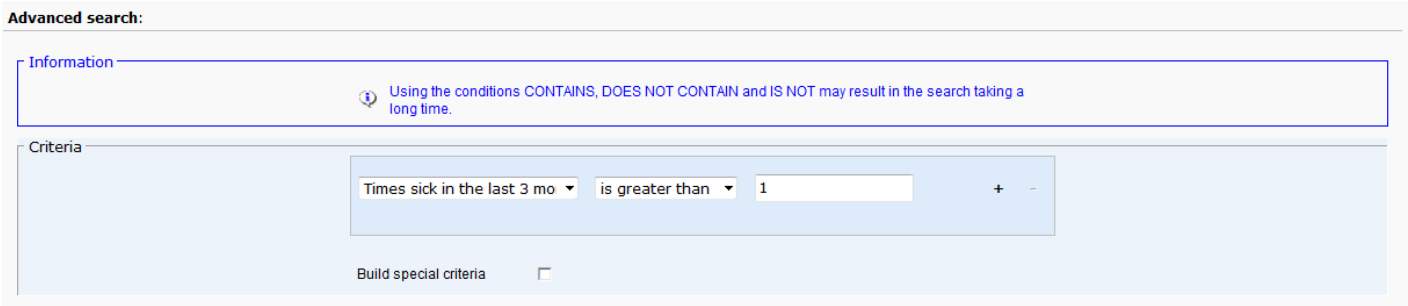
Advanced Searches

Advanced searches allow you to run queries on data which can then be exported to Excel. You can search by people, position and by absence. For example a useful advanced search may be to identify the number of staff that have been off sick in the last 3 months or which staff had started at the University before a given date. Results will only be displayed for staff who report directly to you.

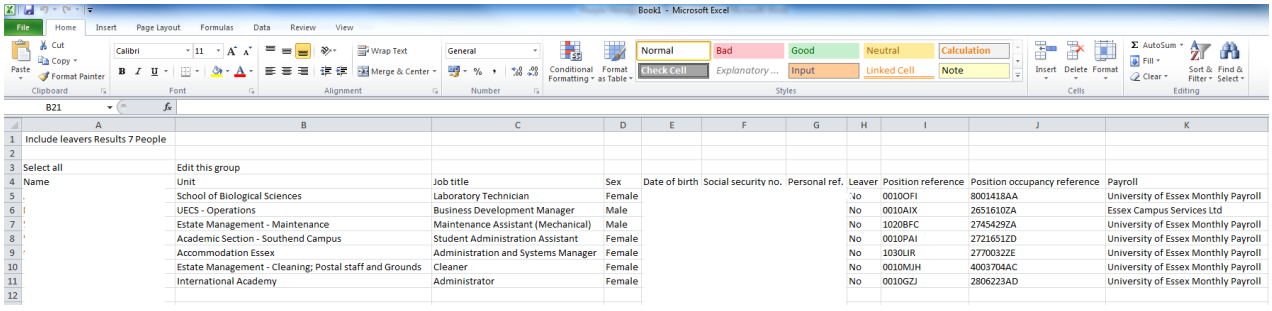
To run advanced searches change the reporting view to **People Search** (see Organisation structure) and then click **Advanced** at the top of the search box:


Organisation: University of Essex ORG People
Search
Smart groups
Advanced
Include leavers
Results 0 People
Surname
Name Unit Job title Sex Date of birth Social security no. Personal ref.
There were no records found for this query

The criteria screen will then appear where you can set your search criteria. For example you can choose 'Times sick in the last 3 months' 'is greater than' and you can enter 1. This will bring back any employees that have had more than one period of sickness in the last 3 months. You can add more than one set of criteria. Simply click on the + at the end of the row to add another row.


Advanced search:
Information
Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.
Criteria
Times sick in the last 3 mo
is greater than
1
Build special criteria

The search results will appear on the left hand side. From here you can right click on them and select Export to Excel. Excel will open and the data will be displayed.



	A	B	C	D	E	F	G	H	I	J	K
1	Include leavers Results 7 People										
2											
3	Select all	Edit this group									
4	Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal ref.	Leaver	Position reference	Position occupancy reference	Payroll
5		School of Biological Sciences	Laboratory Technician	Female				No	0010OFI	8001418AA	University of Essex Monthly Payroll
6		UECS - Operations	Business Development Manager	Male				No	0010AIX	2651610ZA	Essex Campus Services Ltd
7		Estate Management - Maintenance	Maintenance Assistant (Mechanical)	Male				No	1020BFC	2745429ZA	University of Essex Monthly Payroll
8		Academic Section - Southend Campus	Student Administration Assistant	Female				No	0010PAI	2721651ZD	University of Essex Monthly Payroll
9		Accommodation Essex	Administration and Systems Manager	Female				No	1030LIR	2770032ZE	University of Essex Monthly Payroll
10		Estate Management - Cleaning; Postal staff and Grounds	Cleaner	Female				No	0010MJH	4003704AC	University of Essex Monthly Payroll
11		International Academy	Administrator	Female				No	0010GZJ	2806223AD	University of Essex Monthly Payroll
12											

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Icons

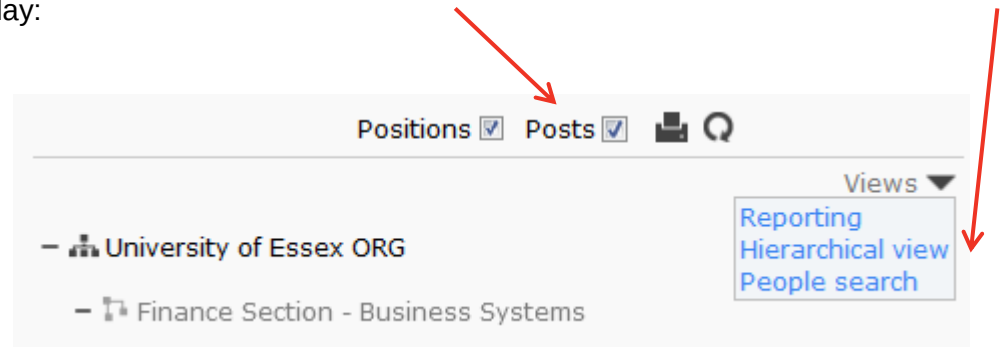
If you select the positions tick box when you are in the Reporting View you will have a range of different position icons on display.

A blue chair denotes a position is occupied

A green char denotes a position which is vacant

A person icon denotes a person occupying a position

By changing the team view to hierarchical/semi hierarchical and selecting the posts tick box the following icons will display:



A hanging node denotes a **Unit**. These can represent a faculty, department, section or sub section e.g. Professional Services, Human Resources or Human Resources – Learning and Development

A desk denotes a **Post.** A post will always be a single item which must belong to a unit and will parent either one or many positions e.g. a post of Cleaner in Accommodation Essex may have multiple cleaner positions beneath it.

A **Refresh** button will appear throughout the various screens within iTrent. If you experience any display problems or wish to refresh the data on the screen you can do so by clicking this icon.

Note: you should NOT refresh People Manager using your browser as this may cause your session to close.

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Viewing Employee Related Data

Personal Details: this screen allows you to view name, title, gender, previous names and start date at the organisation. Data contained on this page must be updated via Human Resources Section with submission of supporting documentation.

Contact Details: this screen allows you to view the contact details of your reportee. The contact information held for each reportee is summarised in People Manager's left hand menu. Any changes to the contact details must be completed by your staff member by logging into **HR Organiser.**

Address Details: this screen allows you to view the home address of your reportee. Any changes to the address details must be completed by your staff member by logging into **HR Organiser.**

Emergency Contact Details: the emergency contact details screen allows you to view the emergency contact details of the reportee. Any changes to emergency contact details must be completed by your staff member by logging into **HR Organiser.**

Probationary Details: this screen details the probationary start and end dates and whether the probation is complete.

Key Date Details: this screen contains key dates including date of birth and expected retirement date.

Position Details: the position details screen displays details relating to the reportee's position, including job title, position start date, location, position end date and reporting manager.

Occupancy Details: this screen displays the occupant name, start date and expected end date if there is one.

Hours and Basis: this screen shows the contractual hours and FTE hours for the reportee. It also shows the category, basis and type of their employment. Any changes to this screen should be made via HR.

Salary Details (Payscale): this screen shows the employees pay scale salary.

Position Occupancy History: this screen shows previous occupants of an employee's position and who their reporting manager was. This screen also includes occupancy start and end dates, grade, FTE and reporting manager position.

Working Pattern Details: this screen shows the working pattern of the reportee. Where the reportee has more than one work pattern you can select the relevant one from the left hand menu. The standard full time working day for employees of the University of Essex is 7 hours and 12 minutes (7.2 hours per day).

It is imperative that the working pattern held is correct as this is what drives annual leave and absence calculations. Incorrect patterns will calculate the wrong amount of annual leave taken by an employee, potentially leaving them short. Any changes to working patterns must be reported to Human Resources immediately (staffing@essex.ac.uk). Who will update this information.

The system can accommodate various working patterns including shift, compressed, average and rotating shifts. For further information on working patterns please refer to the working pattern information sheet available on the People Manager web page.

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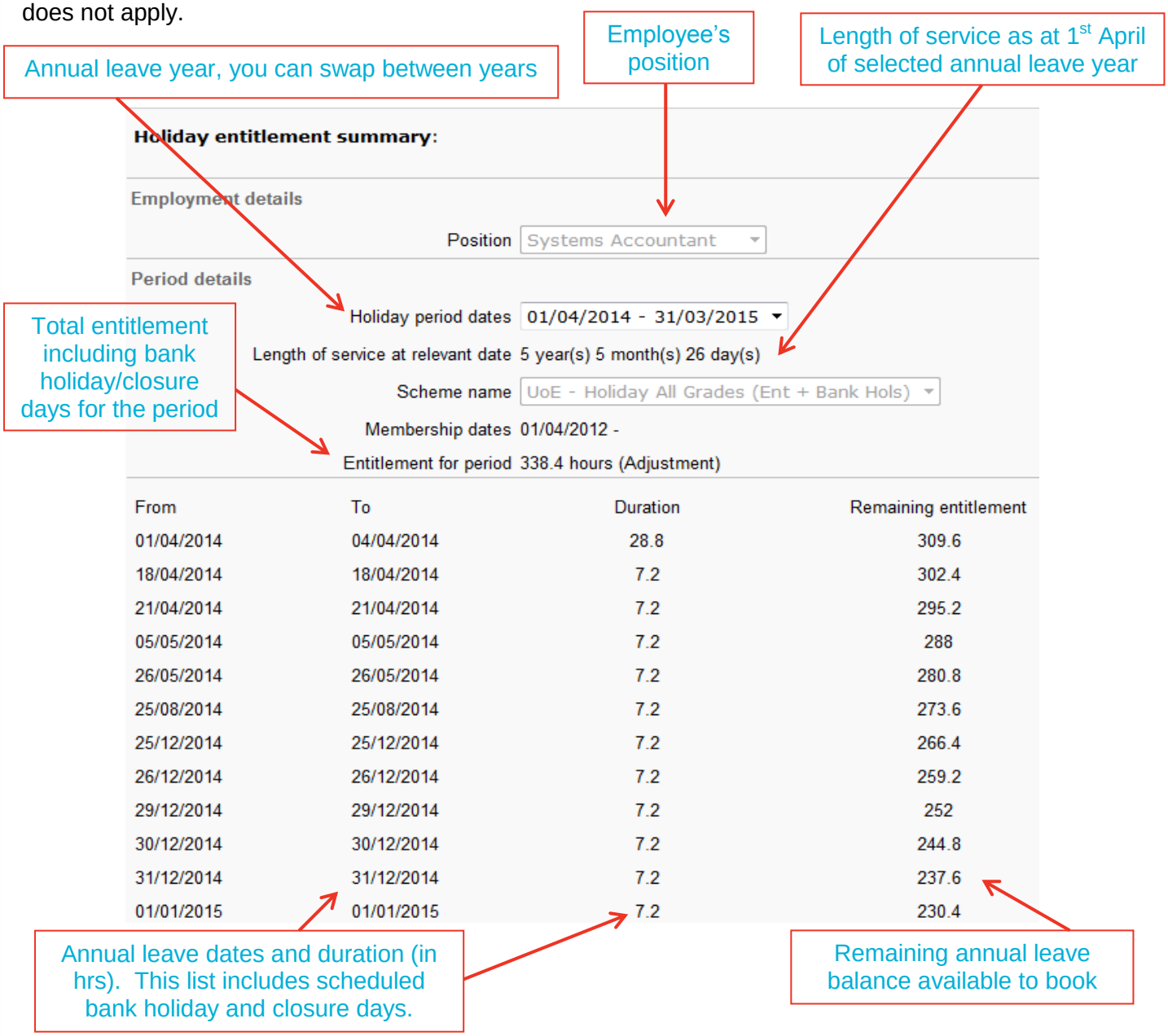
Managing Absence

Holiday Entitlement Summary
This screen shows details of the leave booked by an employee. This includes their annual leave entitlement, all the annual leave they have requested and any bank holidays and University closure days which have been automatically loaded in to the system.

For employees on **grades 1-6** their length of service determines their annual leave entitlement. The basic allowance is 165.6 hours (23 days). If they have received 5 years' service they are entitled to 172.8 hours (24 days). 7 years equates to 180.0 hours (25 days) and 12 years 187.2 hours (26 days). This is pro-rated for part time employees.

For employees on **grades 7-11** they are entitled to 201.6 hours (28 days) basic annual leave. Long service does not apply.


Annual leave year, you can swap between years
Employee's position
Length of service as at 1st April of selected annual leave year
Total entitlement including bank holiday/closure days for the period
Annual leave dates and duration (in hrs). This list includes scheduled bank holiday and closure days.
Remaining annual leave balance available to book

Holiday entitlement summary:

Employment details

Position: Systems Accountant

Period details

Holiday period dates: 01/04/2014 - 31/03/2015

Length of service at relevant date: 5 year(s) 5 month(s) 26 day(s)

Scheme name: UoE - Holiday All Grades (Ent + Bank Hols)

Membership dates: 01/04/2012 -

Entitlement for period: 338.4 hours (Adjustment)

From	To	Duration	Remaining entitlement
01/04/2014	04/04/2014	28.8	309.6
18/04/2014	18/04/2014	7.2	302.4
21/04/2014	21/04/2014	7.2	295.2
05/05/2014	05/05/2014	7.2	288
26/05/2014	26/05/2014	7.2	280.8
25/08/2014	25/08/2014	7.2	273.6
25/12/2014	25/12/2014	7.2	266.4
26/12/2014	26/12/2014	7.2	259.2
29/12/2014	29/12/2014	7.2	252
30/12/2014	30/12/2014	7.2	244.8
31/12/2014	31/12/2014	7.2	237.6
01/01/2015	01/01/2015	7.2	230.4

*Note: employees **do not** see this screen in HR Organiser.*
Entitlement for years prior to your departments rollout will not show correctly as the data has not been configured.

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Authorising Annual Leave

<u>This section only applies to staff who book annual leave using HR Organiser</u>

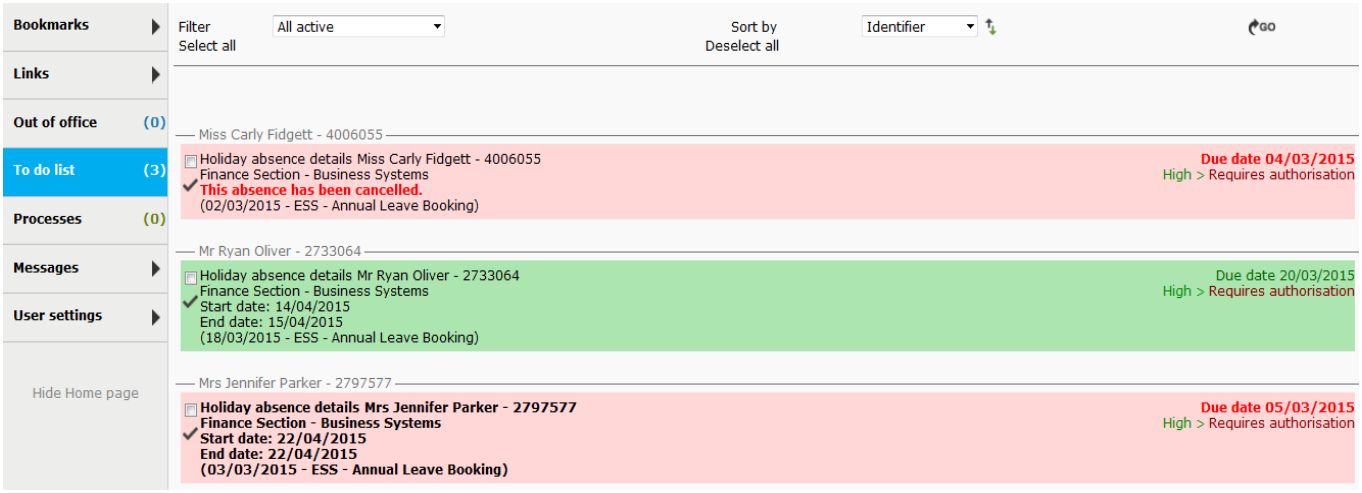
When a request for annual leave is submitted by an employee through HR Organiser you will receive an email request notification.

University of Essex
Annual Leave Request - Action Required
An absence has been requested which needs your authorisation. Log in to People Manager to view the details.
Mr Joe Bloggs
Finance Assistant
Type: Personal Holiday
Start date: 01/09/2014 FULL
End date: 01/09/2014 FULL
Start balance: 154.8 hours
Holiday requested: 7.2 hours
End balance: 147.6 hours
People Manager
This e-mail has been generated via HR Organiser

The request appears as above. It details the employees name and position and the start and end date of the requested holiday. It shows their starting balance and their end balance upon deduction of the requested date. The email prompts you to log in to People Manager which you can do by clicking on the People Manager box on the right hand side.

Remember you need your University username (without the @essex.ac.uk) and your University password. This is the same password you use to log on to the network. Refer to page 4 if you are having trouble logging in.

Once you have logged in click on the **To Do List** link, here are the tasks that require your attention.



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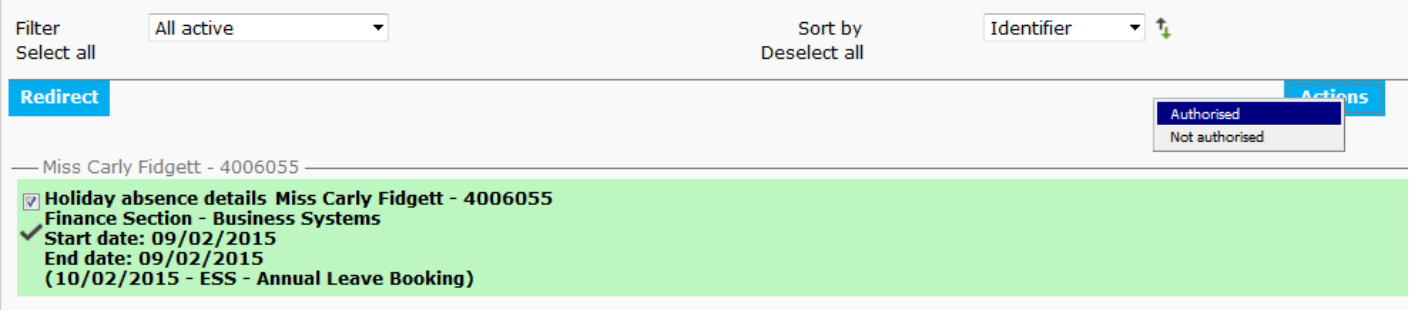
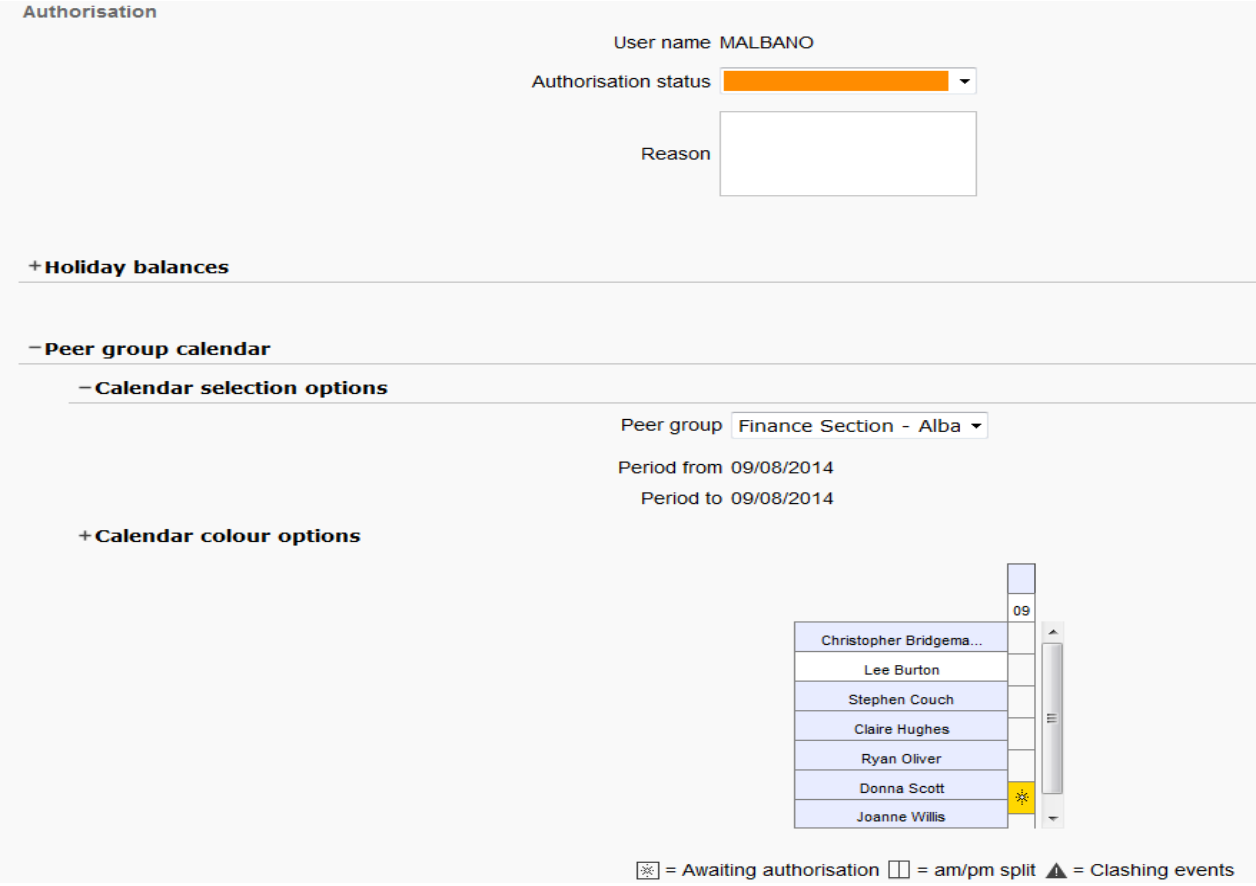
There are two ways you can authorise annual leave. Firstly to action the tasks quickly click on the tick box next to one or more items on the list. This will display an **Actions** button. Clicking on the button will bring up a drop down menu giving you the options of **Authorised or Not Authorised** for one or multiple requests.

Caution should be taken when authorising multiple requests from this point as other team absences may already exist.



Secondly, to make a more fully informed decision, click anywhere on one task to take you to the **Holiday Absence Details**. By expanding the Peer Group Calendar you will be able to see details of any absence already authorised for your team for the requested absence period. If you are happy to authorise this request use the drop down menu to authorise and then press **Save.**



You should aim to action all holiday requests within 48 hours of receiving them. When the request has been processed a notification email will automatically be sent to the member of staff who requested the absence advising them of your decision. The task is now complete.

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Amending/Cancelling Annual Leave from the Past

If an employee wishes to cancel or amend an annual leave date in the past (for example if they were ill or didn't take the absence but left it too late to cancel) they are unable to do this themselves in HR Organiser. You will need to amend this on their behalf. To do this you need to go into the **Holiday Date Details** screen. Please refer to the **Holiday Absence Details** section.

Amending/Cancelling Annual Leave booked for the future

Employees are unable to amend their own annual leave dates until you have authorised them. If an employee chooses to amend the dates of their annual leave you will receive a new email. You will also receive a task in your **To Do List** to approve the changes.

If an employee cancels a future request you will receive a notification email. The cancellation will also appear as a task in your **To Do List**. To clear this select it using the tick box and click **Authorised.** It will now disappear.

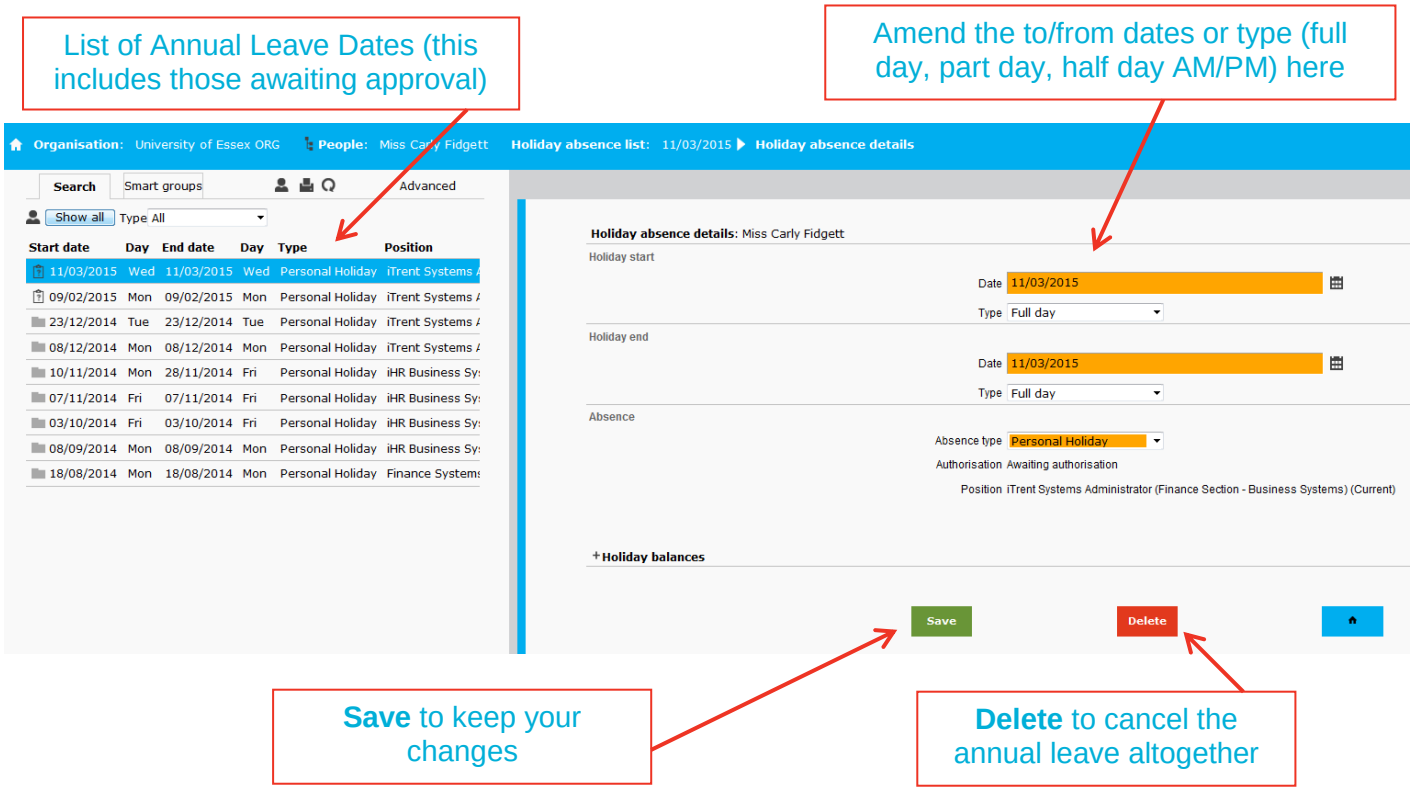
Holiday Absence Details

You can find this screen on your links page under **Holiday Date Details**. It shows details about the annual leave dates your reportee has booked including those awaiting authorisation. This is the screen you get directed to when you click on a task in your **To Do List**.

The annual leave dates are listed down the left hand menu and the display panel shows more details once a date has been selected.

If you are required to amend an annual leave date you can do it from here. Select the period of annual leave from the left menu, change the dates as necessary in the display panel and click **Save.** It will update immediately. If you need to cancel the period of annual leave simply select it and press **Delete.** The annual leave will now be removed.

Remember your reportees can not cancel or amend annual leave dates in the past; you will have to do this for them. They can only cancel/amend dates that are yet to occur.


List of Annual Leave Dates (this includes those awaiting approval)
Amend the to/from dates or type (full day, part day, half day AM/PM) here
Organisation: University of Essex ORG
People: Miss Carly Fidgett
Holiday absence list: 11/03/2015
Holiday absence details
Search
Smart groups
Advanced
Show all
Type All
Start date Day End date Day Type Position
11/03/2015 Wed 11/03/2015 Wed Personal Holiday iTrent Systems
09/02/2015 Mon 09/02/2015 Mon Personal Holiday iTrent Systems
23/12/2014 Tue 23/12/2014 Tue Personal Holiday iTrent Systems
08/12/2014 Mon 08/12/2014 Mon Personal Holiday iTrent Systems
10/11/2014 Mon 28/11/2014 Fri Personal Holiday iHR Business Sy
07/11/2014 Fri 07/11/2014 Fri Personal Holiday iHR Business Sy
03/10/2014 Fri 03/10/2014 Fri Personal Holiday iHR Business Sy
08/09/2014 Mon 08/09/2014 Mon Personal Holiday iHR Business Sy
18/08/2014 Mon 18/08/2014 Mon Personal Holiday Finance System
Holiday absence details: Miss Carly Fidgett
Holiday start
Date 11/03/2015
Type Full day
Holiday end
Date 11/03/2015
Type Full day
Absence
Absence type Personal Holiday
Authorisation Awaiting authorisation
Position iTrent Systems Administrator (Finance Section - Business Systems) (Current)
+Holiday balances
Save
Delete
Save to keep your changes
Delete to cancel the annual leave altogether

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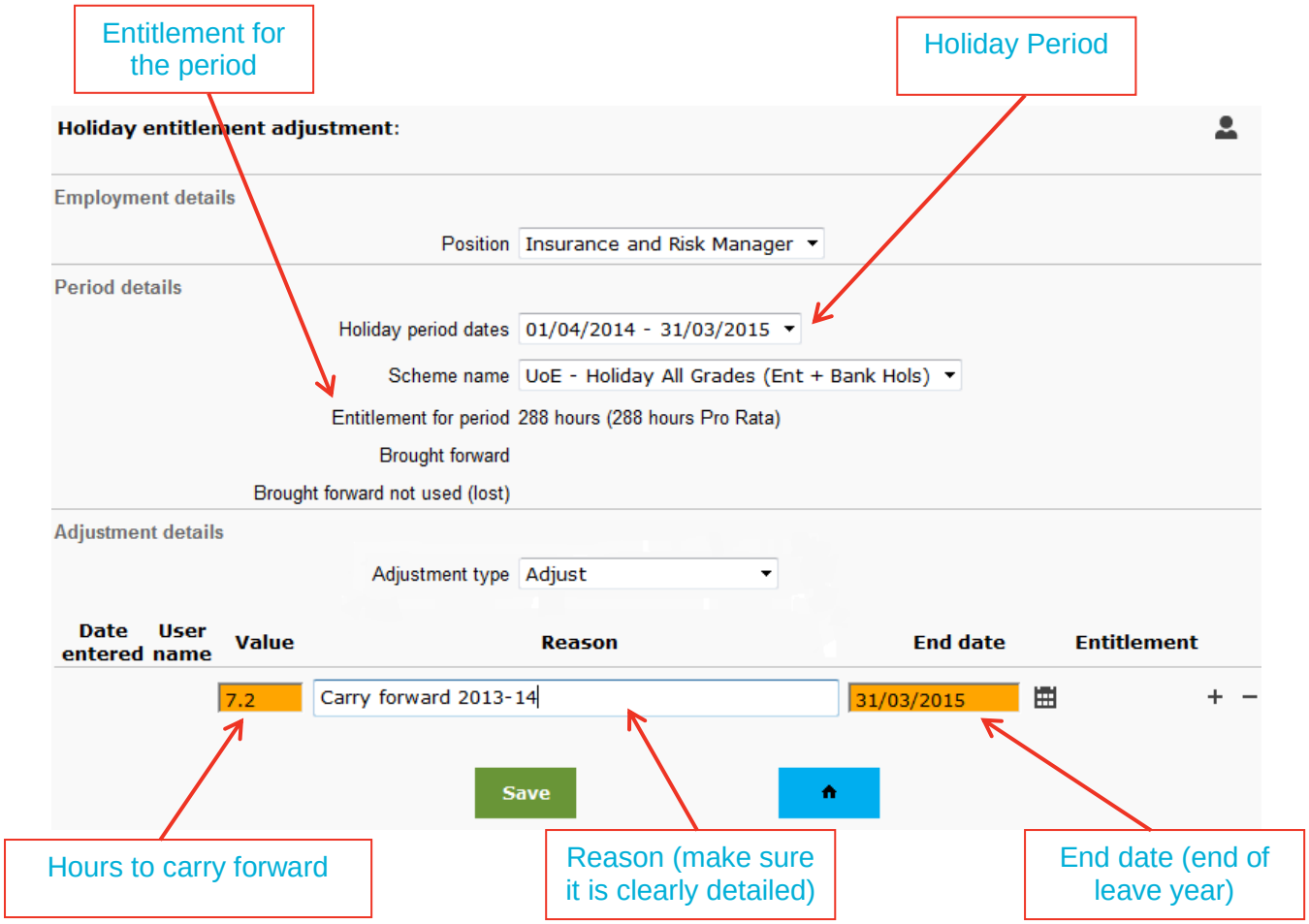
Input a Holiday Entitlement Adjustment

This screen will allow you to enter any manual adjustments you might need to make to an employee's Holiday Entitlement. For example you might need to add leave that has been carried forward from the previous leave year. This is not an automatic process and it will need to be manually done.

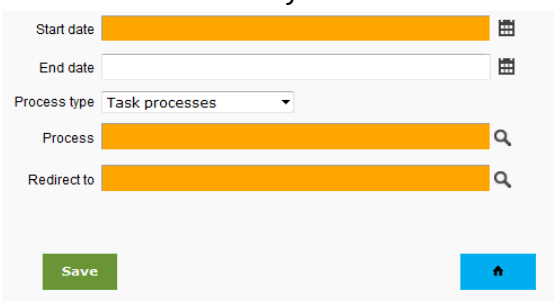
To make an adjustment select 'Adjust' from the Adjustment type drop down menu. Make sure you have selected the correct Holiday Period dates. A box will appear allowing you to enter the amount of **hours** you are adding on/deducting and you must also enter a reason. It is important you make the reason clear so it is easily understandable should you need to look back on the adjustment. For example "Carry forward 2013-2014". The end date will usually be the end of the annual leave year. Then click Save. The entitlement will take in to account this adjustment straight away.

If processing carryover for the next leave year this adjustment should only be made on or after the 1st April.



Manager Task Redirection (when out of the office)

If you know you are going to be out of the office you can set a task redirection so that any annual leave requests that come in by employees can be redirected to another manager in your absence. To do this select: **Manager Task Redirection**. Here you can select a start date and an end date (if you know it) change the process type to **Redirect All** and in the **Redirect to** select the magnifying glass and enter the surname of the person you want the tasks to go to. Click Save.



Please note if you regularly have other tasks in iTrent you may wish to change the process type to task processes and in process search for ESS - Annual Leave Booking. This is only likely to apply to members of HR.

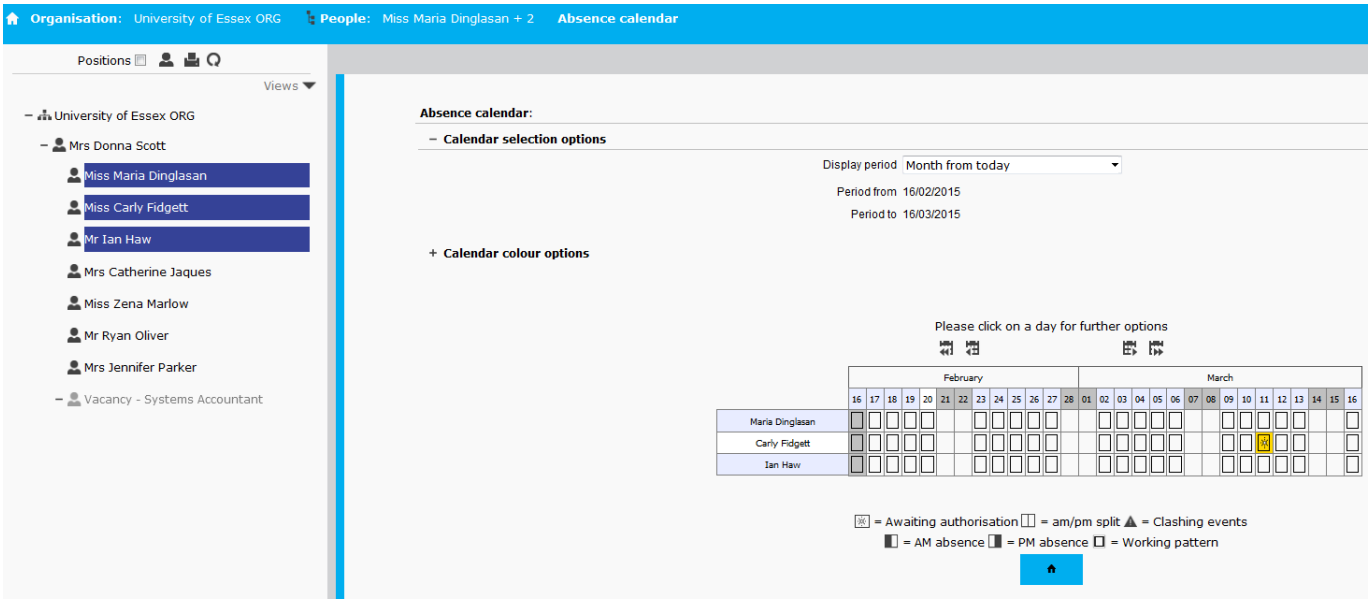
University of Essex

Absence Calendar

The Absence Calendar displays all staff absences that have been recorded in iTrent. This includes:

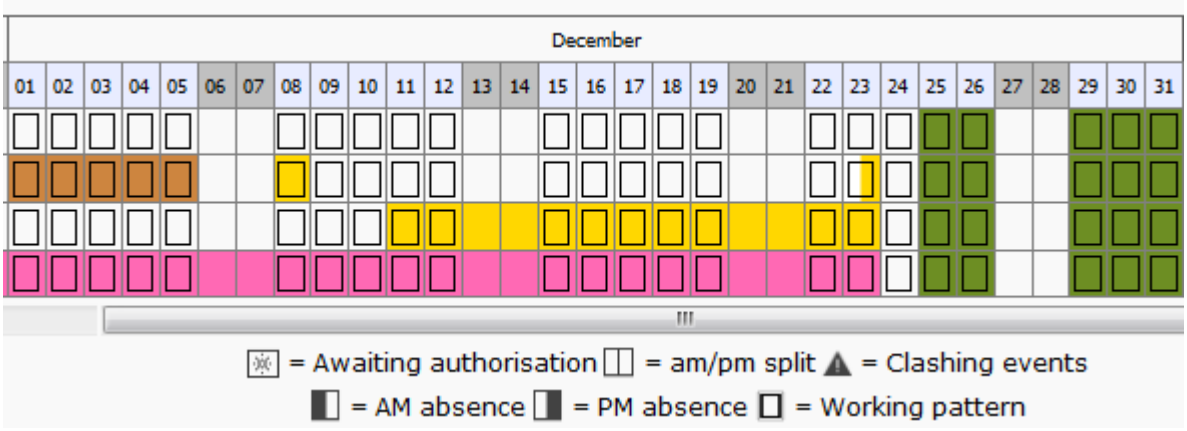
- Learning events (coming soon)
- Bank holidays
- University closure days
- Maternity/Paternity absence
- TOIL (coming soon)
- Sickness

As a People Manager you can review absences within your responsibility. It is possible to display the calendar for more than one reportee at any one time. You can do this by pressing (and holding) the Ctrl key and clicking the name of each person you wish to view. Then click on **Absence Calendar**.



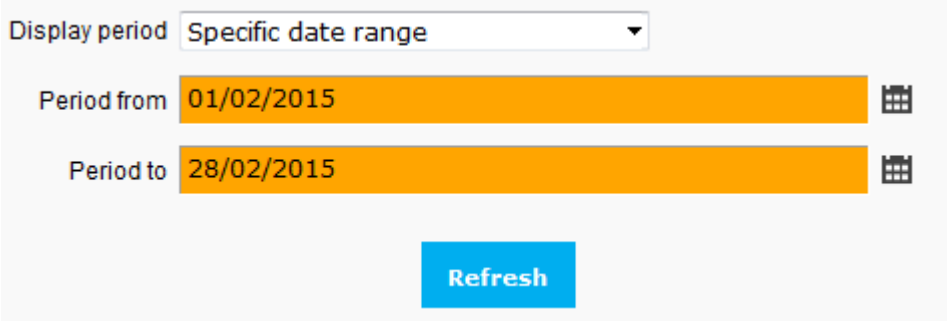
Under the Calendar selection options you can choose the period you wish to display. Choose from the drop down. By selecting the + next to Calendar colour options you can view all the different types of absences and how they are colour coded. Any colour changes will be reflected in the Out of Office section on the homepage.

Use the tick box next to the absence to include/exclude it from the display. Non-working periods will be displayed on the calendar using the colour for Other absences.

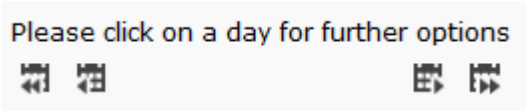

December
01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
= Awaiting authorisation
= am/pm split
= Clashing events
= AM absence
= PM absence
= Working pattern

Each absence is shown as a coloured box. When the display period or the number of people exceeds the screen capacity scroll bars are provided to enable you to move left/right up/down. The headings to the calendar and the people names will always remain in focus.

When you select a specific date range in the display period you will need to click on the Refresh button for it to update.

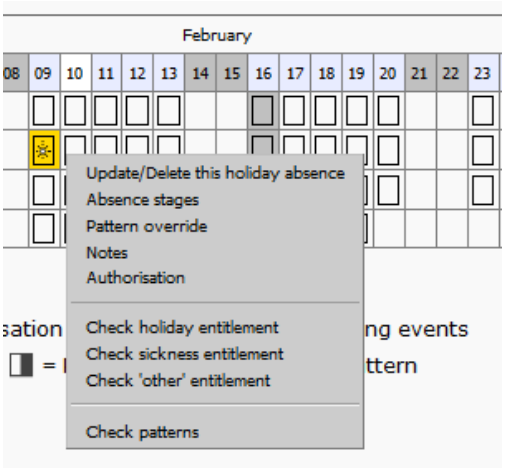


You also have the option of adjusting the display period by clicking on the adjustment buttons. This will take you back or forward 3 months or back or forward 1 month.



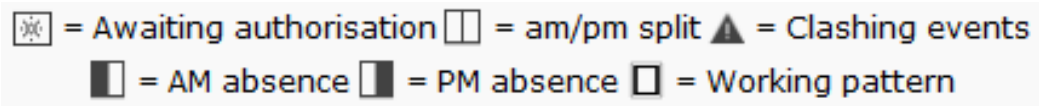
When you move the cursor over the cells in the display a pop up is shown. This holds the details of the absence and the person or where no absence is recorded just the person. The details include name, position, day and date. Type of holiday, status (e.g. awaiting authorisation), position, working pattern and working pattern start date. Some employees will hold more than one position.

If you right click on any date in the absence calendar this will bring up a menu of quick links, including Check holiday entitlement and Check patterns.



Additional information:

- **Half-day AM absence** – the left side of the cell is in the absence calendar
- **Half-day PM absence** – the right side of the cell is in the absence calendar
- **AM/PM split** – when two absences are split across a single day (e.g. one absence ends at 11am and the next starts are 11am or later) then the day is marked to indicate a split but only one of the absence colours is displayed.
- **Clashing events** – when an absence has been recorded that clashes with another absence (a sickness on the same date as a personal holiday for example) the day of the absence will display an exclamation mark (!) the pop up will display the details of the absences that are clashing
- **Working pattern** – when an employee has a working pattern attached and you have selected working patterns to be displayed then each working day is shown with an inner box. Absences that occur on a working day are show with their absence colour and box (if you only want to display working patterns for absences then you should set the working pattern colour to be the same as the background colour)



Yearly view

When a single employee has been selected you are able to display the calendar in a yearly view. Details about each absence are displayed as a pop up as you move your cursor over the dates. You can view by either dates or days. The different views offer identification of trends e.g. absences relating to the same period each month (around monthly deadlines?) or absences relating to particular days of the week (Friday/Monday absences).

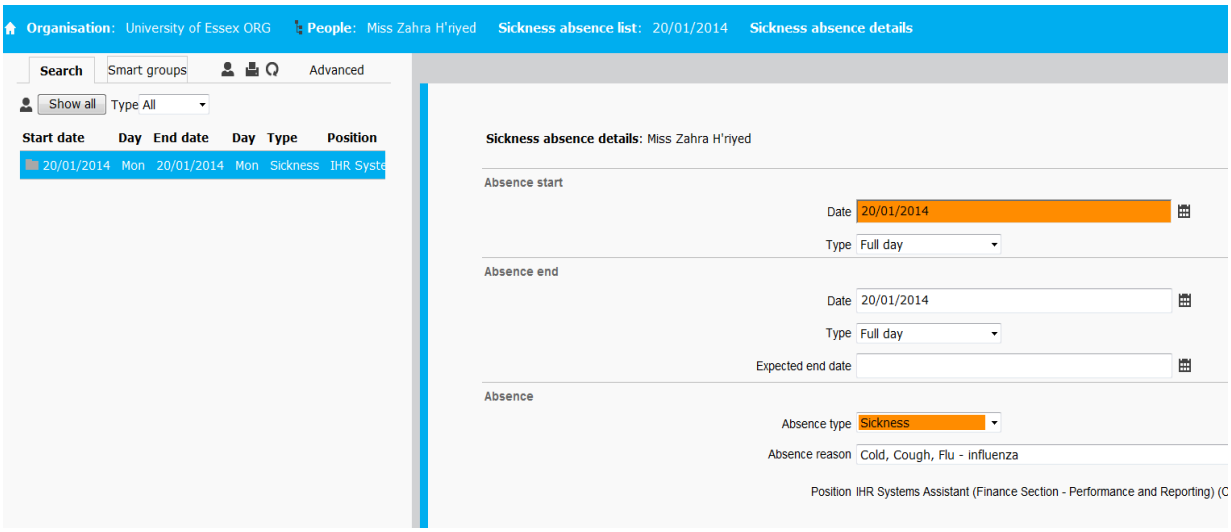
Sickness Absence Information

Sickness Entitlement Summary

This screen shows details of any sickness entitlement taken by an employee including details of the sickness scheme, entitlement to paid sickness absence and sickness days used and those available.

Sickness Absence Details

This screen shows details of the sickness period including date and nature of sickness taken. You can view details of different absences by selecting an occurrence from the left hand menu.



University of Essex

FAQ's

Logging In and Security

When I try to log in to People Manager it says my log in details are incorrect? Make sure you have entered your username **without** the @essex.ac.uk. Your password is your University password, has this recently changed? Your password must not contain any of the following characters as these are unsupported by the system " £ ¬ ¦ | \

Do you have a current contract with the University? Once you have left the University you will no longer have access to People Manger or HR Organiser.

How secure is the information held in People Manager? The data within iTrent is held within a secure database on campus. Access to data within the system requires an iTrent user ID – your University username and password. Each user ID has a security profile that restricts access to only the areas they need to do their job and only the staff for whom they have responsibility or administrative rights. Connections to iTrent are encrypted, look for the padlock symbol in your browser. People Manager and iTrent can only be accessed behind the University of Essex firewall. To ensure the security of the information held in the system you should also always remember to log out when you finish using People Manager. Remember to never share your password with anyone.

Absence

Do my employee's need to book the bank holidays off? No. The system automatically calculates and deducts the bank holidays for them. If your employees are booking annual leave they need to remember to book around them.

Can my employee's book leave for next year? Yes, they just need to book it in the normal way; it will automatically come out of next year's allowance.

I don't think my employee's entitlement is correct? Please ask your employee to check the Absence User Guide as this gives examples of how annual leave entitlements are calculated. If you are still having problems please contact us.

Are anniversary year entitlements included in annual leave? Yes, please see the Holiday Entitlement Summary section. Extra days for grades 1-6 will automatically be included at the beginning of the leave year that the anniversary falls.

How do I process carryover? It should be noted that unused holiday entitlement cannot normally be carried over from one leave year to the next. Any alternative arrangements should be discussed with your employee and authorised by yourself. Carryover should never be more than 5 days. To add carryover to an employee's entitlement please refer to the Input a Holiday Adjustment section.

My employee booked annual leave but actually ended up being off sick, what should I do? If the employee didn't actually take their annual leave then you can go in to People Manager and remove it. This way their balance will be credited back with the leave they didn't take. See the Amending/Cancelling annual leave sections.

My employee has been on Maternity/Paternity/Adoption leave, will the system show their accrued annual leave and bank holiday entitlement for the period of their absence? The system will have the outstanding annual leave balance available to be taken but there will need to be an adjustment made to add any bank holiday amounts to their entitlement. This should be done automatically by HR when your

employee returns but if you think it does not look correct, please contact the HR department who will be able to help you further.

My employee has been absent due to long term sickness, will the system show their accrued annual leave and bank holiday entitlement? The system will have the outstanding annual leave balance available to be taken but there will need to be an adjustment made to add any bank holiday amounts to their entitlement. This should be done automatically by HR when they return but if you think it does not look correct, please contact the HR department who will be able to help you further.

People Manager

I am not getting my employee's leave requests? You will need to notify HR as there might be a chance you have not been set up as their reporting manager.

I can't see a member of my team when I log in to People Manager? You will need to notify HR as there might be a chance you have not been set up as their reporting manager.

I am going to be out of the office, who will approve my reportee's annual leave whilst I am away? If you know you are going to be out of the office you can set a Manager Task Redirection for the dates you are going to be away. See the Manager Task Redirection section. This way holiday requests will go to another manager in your absence. It is important that this is agreed with the other manager before you go away and they are aware of this. Remember managers are the only ones who will have access to People Manager.

My employee has two jobs; I am only their manager for one. How does this affect me? You will receive holiday requests for only the periods of time when you are their manager. When they are in their other role the leave requests will go to the manager for that job.

How long do I have to approve holiday requests? You should aim to action all holiday requests within 48 hours of receiving them.

I am a new manager; do I need to do anything? People Manager is not automatically assigned to you. If you are a new manager you will need to ensure you have notified us so we can give you the necessary access. The leave administrator for your department may have already made us away of your arrival so it is best to double check with them first.

I am leaving the University, what should I do? You will need to ensure your leave requests are redirected to another manager until your replacement is due to start.

Employee Information

Why do some of my reportee's position details have a starting date of 01/01/1990? Some of the details that iTrent displays have been given a start date of 01/01/1990 to denote that the condition is a standard setting that has been in place from the outset of the system. Therefore, when a reportee has a start date of 01/01/1990 against any of their details then this denotes that there is employment history held within our legacy HR systems.

My employee's working pattern is wrong? You need to contact HR immediately so this can be corrected. Absence is driven on working pattern so it is crucial that it is correct.